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New Year Rollover and Student Locator

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1. Overview

The first-generation Student Locator system is designed to work with student data from a single school year. More precisely, all students that are processed as part of either individual requests or event-driven transactions are considered to be from the same school year, as defined in the Settings dialog box of the Student Locator Console. One consequence of this limitation is that the system cannot process current-year students and future-year students concurrently. Students entering the district next year cannot receive a State ID through the Student Locator system until a manual New Year Rollover (also called End of Year) procedure has taken place.

This document describes New Year Rollover with regard to Student Locator and refers to the documentation for common student information systems that work with Student Locator. Administrators should be aware that New Year Rollover impacts all SIF Agent software and applications differently and is not a process guided by industry standards. Each application may have its own unique requirements and procedures to promote students and prepare data for the next school year. If your SIF Infrastructure is being used for general application interoperability in addition to student ID management, please consult the documentation of the other participating applications when planning New Year Rollover procedures.

About This Document

The information herein applies to the following software products:

- Edustructures Student Locator Agent 1.x

- Edustructures SIFWorks® Enterprise ZIS 1.5.1 and later

State-Specific Information: Readers will generally receive the above products (and perhaps others) in conjunction with a statewide student ID management project or Schools Interoperability Framework (SIF®) initiative. Some of the information in this guide may differ for your state or school district. Please consult state-specific adjunct documentation, if available.

SIS-Specific Information: The general description of New Year Rollover, as it relates to Student Locator, applies to all student information systems. Consult the SIF Agent documentation for your specific student information system (SIS) to see how to conduct new year rollover.

This document assumes a working understanding of Student Locator, the Schools Interoperability Framework, and the software components listed above.

About New Year Rollover (End of Year)

New Year Rollover (NYR), also known as End of Year (EOY), is the term given to a broad set of tasks required to prepare SIS data for the next school year. This includes enrolling students that are entering the district next year, graduating and promoting students, clearing account balances, etc. Most K-12 applications have a New Year

Rollover procedure. Nearly all districts go through an NYR/EOY procedure whether they use SIF or not.

For the purposes of this document, we divide NYR into two phases:

1. **Pre-Rollover**. In this phase, which begins as early as January of the current school year, the district begins to build next year's student roster by pre-enrolling students such as incoming kindergartners.

2. **Final Rollover**. In this phase, which begins after the current school year has ended and is completed before the new school year starts, the district finalizes the New Year Rollover process for its student information system and other K-12 applications.

Currently, the Student Locator system supports Final Rollover only. Pre-enrolled students do not participate in Student Locator transactions until after the Final Rollover process has completed.

SIF and New Year Rollover

Because it is so varied from vendor to vendor, the Schools Interoperability Framework standard does not address the concept of New Year Rollover. In the absence of an industry-standard procedure, each SIF Agent deals with rollover in its own way to satisfy the unique requirements of the application. If your district uses SIF for purposes other than Student Locator, be sure to consult each SIF Agent's documentation for product-specific instructions. This Tech Note applies to Edustructures Student Locator only.

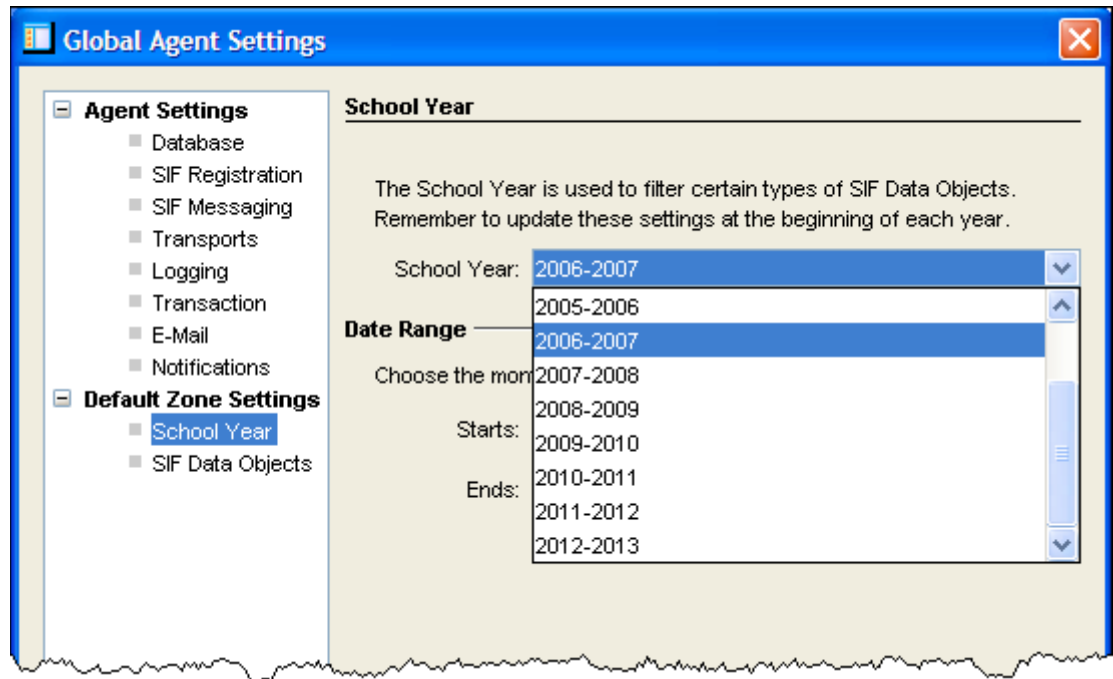# 2. New Year Rollover with the Student Locator Agent

These instructions apply to Final Rollover only (for all SIS products) and are not suitable for general year-to-year operation of the system. If you need to obtain State IDs now for pre-enrolled students that will not become active until next year, follow the steps listed in the section "Manually Obtaining State IDs for Pre-Enrolled Students" on page 7.

Step A. Student Information System Rollover

1. Follow the steps for your student information system (SIS), as described in the SIS agent documentation. If you need help finding the correct procedure, contact your SIS vendor; your state office or Edustructures can also help find updated information.

2. Once New Year Rollover procedures are finalized for your SIS system, and after that product's SIF Agent is configured to publish next year's data to the district's zones, proceed with Step B.

Step B. Change School Year in Student Locator

1. Open the Student Locator Console.

2. Choose **File > Agent Settings**.

3. Highlight the **Default Zone Settings > School Year** node in the tree.

4. Choose the correct school year from the combo-box (illustrated above).

5. Close the Settings dialog box.

6. Restart the Student Locator agent for the changes to take affect.

The selected school year is now the active year. All transactions performed by Student Locator will be for this school year. New Year Rollover processing is considered complete. You can re-synch and then request state IDs for all students that do not currently have one.

Manually Obtaining State IDs for Pre-Enrolled Students

The instructions provided in the previous section apply to Final Rollover only and are NOT suitable for general year-to-year operation of the system. If you need to obtain State IDs for pre-enrolled students that will not become active until next year, you must do so with a manual non-SIF process. Consult the documentation for your state's ID management system or information provided by your state office of education for specific details on manually obtaining and importing State IDs.